

## 1. Project Design

“Stepping Stones” is the historic home of Bill Wilson (1895-1971), co-founder of Alcoholics Anonymous and Lois Wilson (1891-1985), founder of Al-Anon Family Groups, a support group for family members and friends of alcoholics and includes Al-Ateen. Stepping Stones was the Wilson’s first and only real home and where they produced many of their important contributions. Bill lived at Stepping Stones until his death in 1971 and Lois until her death in 1988.

The museum owns approximately 8,000-10,000 three-dimensional objects related to the lives of Bill & Lois Wilson and their founding of AA and Al-Anon. A formal inventory has never been undertaken; the most comprehensive listing of the collection was made by Lois Wilson in 1980 when she attempted to impose a measure of intellectual control over their belongings. For the continued security and preservation of the collection, the Stepping Stones foundation has identified conducting such an inventory as one its highest priorities.

The museum currently employs a full time executive director, who lives in a modern apartment on site, and a part time administrative assistant. While it moves forward with fund raising and increasing its visibility, the museum recognizes the need to secure its collection and to gain intellectual control over it. The most efficient way to meet this important goal is to hire a part-time cataloger to oversee the work of trained volunteers over the course of two years.

The Executive Director, with help from the Administrative Assistant, will actively seek an experienced and qualified individual who would commit to the project for a two-year period. The following tasks will be undertaken:

**Phase I, Inventory** - The cataloger will work from room to room, starting with the Main House, and assign a temporary inventory control number to each object. S/he will attach an acid-free tag bearing this unique number to the object and, with the assistance of a volunteer, enter basic descriptive information into the PastPerfect database on a notebook computer. Based on figures provided by Joann Lindstrom, a collections consultant who has conducted several inventories of historic collections and is familiar with the collection at Stepping Stones, it is expected that the pair could inventory approximately 100 objects per half day of work. Based on a collection of 10,000 objects, the Inventory Phase will be completed within five months.

**Phase II, Cataloging** - The cataloger will work with a trained volunteer and implement the following steps on each object:

- Assign and apply a permanent accession number.
- Provide a thorough description of the object, including dimensions.
- Photograph each object with a digital camera.

At the end of each day, the cataloger will download the object images into the PastPerfect database.

Based on the estimated 10,000 objects, the cataloging phase could be completed within a seventeen-month period. This projection is based upon the assumption that it would take approximately ten minutes to catalog each object, equaling six objects per hour or 25 per day. Included within the time allowance are variables that may impact the overall time frame, including downloading of object images, insertion into their proper

catalog records, and additional time that may be necessary when photographing large or cumbersome objects such as quilts.

Halfway through each of the two phases, the Executive Director will meet with the cataloger to review progress: number of objects inventoried, supply budget, assess the quality of the volunteer assistance, etc. More time will be committed by the permanent staff, rotation of volunteers, purchase of additional supplies, or any other modification to the original project design in order to meet the project's goals of a complete inventory and catalog of the museum's three-dimensional collection.

## 2. Grant Program Goals

*The Stepping Stones Inventory and Cataloging Project matches the Museums for America goal of sustaining cultural heritage.*

Imposing intellectual control over the museum's collection is vital to its continued survival. The foundation recognizes that it must protect the collection from theft and would be better able to do so with a comprehensive, digital catalog of the collection. Knowing what objects were owned and used by the Wilsons is key to meeting the educational and interpretive goals set out in the museum's strategic plan. The process of cataloging and photographing the collection will provide invaluable information to scholars, researchers and the museum staff in interpreting the museum's mission of sharing the story of hope for the recovery from alcoholism.

The foundation recognizes that the site is currently a resource for recovering alcoholics; it strives to make the site and its contents more meaningful to the *general* public. Through outreach, educational programs, tours, and promotion, the foundation is determined to disseminate broader themes found within the museum and buildings on the site.

Following are several examples of the types of objects on display that significantly contribute to the interpretation of the mission:

**Bill Wilson's desk.** Bill W. wrote "The Big Book" at this desk which is located in the studio, a separate building on the site, coined "Wit's End". This desk is considered the ultimate touchstone of the collection and commonly evokes powerful emotional reactions from visitors.

**The Kitchen Table.** "The" conversation that sparked the idea of AA was held between Bill Wilson and his best drinking pal, Ebby, at this table in 1934. This object also holds deep meaning to visitors.

**Lois Wilson's desk.** Lois sat at this desk and wrote letters to eighty-nine different addresses in 1951, asking if they wanted to practice the 12 steps for their own emotional recovery through Al-Anon.

**The Map.** Bill maintained a large U.S. map with map pins indicating where AA groups were founded.

**Letter from Carl Jung.** Jung wrote to Bill Wilson in 1961, congratulating him on finding a solution to one of the most devastating illnesses of the time.

The collection is unique, and worthy of preservation, on several national, and global, levels:

- the collection represents the intact and comprehensive belongings of two of America's most profound influences on recovery and thinking in general, preserved as they had left and used them.
- the collection spans a great majority of the 20<sup>th</sup> century, with most objects dated between 1900 and 1985, providing an excellent site to research significant periods and events within this period including the Depression, World War II, the civil rights movement, all of which not only touched the lives of Bill and Lois Wilson and the people who recovered from alcoholism due to their diligence, but other Americans as well.
- The site has importance from a museological perspective as well. Stepping Stones is one of the few sites in the U.S. that owns and maintains the belongings of an individual, Bill Wilson, whose works have influence reaching around the globe. Studying the audiences that come to Stepping Stones as well as their reactions to exhibitions, interaction with Bill Wilson's objects, and the challenges the museum faces in attempting to provide an authentic but secure environment in which to appreciate the Wilsons' contributions to American culture, can provide the field with valuable qualitative feedback about historic site interpretation that has yet to be fully studied.

### **3. How the Project Fits into Strategic Plan and Mission**

In the years since Lois Wilson was at the helm of the institution, the foundation has succeeded in maintaining the home in nearly the exact way it was as when Lois and Bill lived there. AA and Al-Anon members visit from all over the world, as do historians, humanities scholars, and community members.

The proposed project directly relates to Goals 1 & 3 of the Strategic Plan:

**Goal 1: Ensure the preservation and care of the Foundation's physical assets for future generations by undertaking thorough and intensive restoration, preservation, and conservation efforts on the collections, buildings, and site utilizing professionally accepted museum practices and historic preservation standards.**

While the strategic plan was written in 2005, Stepping Stones has focused on museum and historic preservation issues since 2001. Over the past five years, the following consultancies were conducted in keeping with this important goal:

- Conservation Assessment Program (CAP) the Main House, performed by Stephen Tilly, Architect, and the contents of the home, performed by C.R. Jones, conservator.

- Workshops on museum education, collections, and management for the Executive Director (“Get Set” grant, through the Upstate History Alliance/New York State Council on the Arts).
- The Museum Institute at Sagamore was attended by the Executive Director to learn more about fundraising for all facets of museum management (“Get Set” grant).
- Conservation Treatment Plan – This past September, the museum brought together conservators in the areas of paper, furniture, paintings, a historic structures architect, an archivist, and a collections consultant to spend two days on site. Their collaborative report is now in the editing stage, but will provide the museum with a Conservation Treatment Plan for the overall site as well as the collections for which the foundation is requesting funds for the inventory and cataloging project. This project was entirely funded by the foundation, in recognition of the priority it places upon professional standards with regard to its collection.

**Goal 3: Implement a successful and evolving volunteer program that encourages members of the community to play a key role in maintaining the site in perpetuity.**

This project will provide the museum with an opportunity to reach out to the community and utilize their organizational skills as cataloging volunteers. Their work will help maintain and preserve the collection.

The long-term impact of this project is significant for several reasons: 1) the institution will have a more secure and well-researched collection in order to better serve the public; 2) a comprehensive catalog of the collection owned and used by the Wilsons will benefit the museum through better access for exhibition, education, and outreach initiatives; 3) digital images of the collection will enable the museum to share the collection to a wider, international audience through its web site or other digital projects; and, 4) knowing the scope and intellectual breadth of the collection will better enable the museum to assess each object’s interpretive uses and prioritize resources for conservation treatment.

#### **4. Strategic Plan: Process and Financial Resources**

In 2005, the foundation hired Annah Perch, its second and current Executive Director. With an organizational change in leadership, the foundation’s board decided that a formal strategic plan was necessary to affirm the museum’s mission, create a vision, and set out goals for the next five years.

The museum wrote and received a small grant from the Upstate History Alliance, a museum service organization serving New York State, to bring in Liselle La France, the Executive Director of Historic Cherry Hill, an historic site in Albany, New York. Ms. LaFrance met with the executive director and the board of the foundation to discuss the process of institutional planning and to evaluate the sites’ readiness to embark upon the strategic planning process. The museum received a favorable recommendation and the board and staff worked together to arrive at a set of four goals to be met over the next five years. With its own funds, the museum hired Anne Ackerson, a museum consultant

specializing in institutional planning, to review and edit the draft plan and to ensure that the goals set out within the plan were in keeping with professional museum standards, and were not overreaching or lofty in their intentions.

Since the approval of the plan in April 2006, *over the past seven months*, the museum has accomplished many tasks using its own operating funds or public grant monies, including:

- Hiring a team of conservators and consultants to work collaboratively on site to assess the preservation needs of the collection and buildings which will result in a Conservation Treatment Plan (\$13,450, Stepping Stones Foundation funds)
- Development of the Visitor's Center to alleviate foot traffic within the Main House and to present a professionally designed exhibition interpreting the lives of the Wilsons and the sites (\$9,800, New York State Council on the Arts Architecture Program funds, \$2,500 of Stepping Stones Foundation funds)
- Repair of the windows of the Main House in keeping with professional historic preservation standards (\$33,985, New York State Environmental Protection Fund, \$33,985 Stepping Stones funds)
- Museum Assessment Program I – Public Dimension Assessment
- Hiring a museum education consultant to develop a guided tour of Stepping Stones (\$2,400, New York State Council on the Humanities).
- Formed a Museum Education Team consisting of humanities scholars and education professionals who are committed to developing an educational product related to the house and the legacy of the Wilsons.
- Successfully implemented a "Friends of Stepping Stones" campaign to provide a continual source of financial support from the community.

#### **4. Appropriateness of Project for Institution, Audience**

The placement of Stepping Stones on the New York State and the National Registers of Historic Places in 2005 recognized the site as significant to the history and culture of New York State and the nation, and marks the historical importance of the Wilsons. The foundation believes that this recognition is just one step that will assist in gaining necessary support to preserve the historic home and its contents in perpetuity.

The Wilsons had an immeasurable impact on the world and their legacy lives on today. Wilson anonymously authored Alcoholics Anonymous (1939), also known as the "Big Book", which has sold well over 20 million copies. He disseminated the idea of alcoholism as a disease and provided a program – the 12 Steps – for treating alcoholism and maintaining sobriety. The 12 Steps remain the most successful means of treating alcoholism and are the central treatment program in most hospitals and clinics. The program has enabled millions of people around the world to achieve and sustain permanent sobriety and helped to reshape the general public's perception of alcoholics. Al-Anon and Alateen have chapters in 115 countries.

In 1990 Life magazine named Bill W. one of the 100 most important Americans of the 20<sup>th</sup> century, and in 1999 Time magazine selected Bill W. as one of the 100 most influential people of the century. A short time spent at Stepping Stones, their historic home, reveals that Lois was as influential as her beloved husband, for the role she played

in her husband's recovery, for her founding of Al-Anon and Alateen, and for leaving the Stepping Stones Foundation to carry on their legacy in perpetuity.

A complete catalog of the collection will enable the museum to better understand its interpretive value, and, in turn, better serve its audience. Stepping Stones is open year-round by appointment. The grounds and garden are open from sun up to sun set at 62 Oak Road, Katonah, New York. Admission is free, although contributions, to help preserve Stepping Stones, are encouraged.

## **6. Project Resources: Time and Budget**

### **August 2007**

- Advertise cataloger position with the Lower Hudson Conference of Historical Agencies, the Upstate History Alliance, the New England Museum Association, and the Museum Association of New York.
- Purchase the notebook computer, PastPerfect software, and digital camera.
- Recruit volunteers to assist with project implementation. It is expected that the museum can identify at least ten individuals to work part time hours in support of the cataloger's work over the course of the project.

### **September 2007**

- Interview candidates.

### **September-October 2007**

- Make offer to best-qualified candidate, hire, and begin project.

### **October-November 2007**

- Project begins.
- Cataloger identifies and schedules appropriate volunteers for assistance
- Cataloger trains volunteers

### **October/November 2007-March 2008**

- Phase I: Inventory takes place

### **February/March 2008**

- Executive Director evaluates progress; adjustments are made as necessary

### **April 2008-July 2009**

- Phase II: Cataloging takes place

**July 2009**

- Project evaluated by Executive Director
- Final report submitted to IMLS

**7. Project Resources: Personnel and Technology****Personnel**

Annah Perch, Executive Director of Stepping Stones, will act as Project Administrator. She has been the chief administrator of the site since August 2005. Ms. Perch lives on site, and will be overseeing the larger aspects of the project including hiring the cataloger, writing press releases, and evaluating project development.

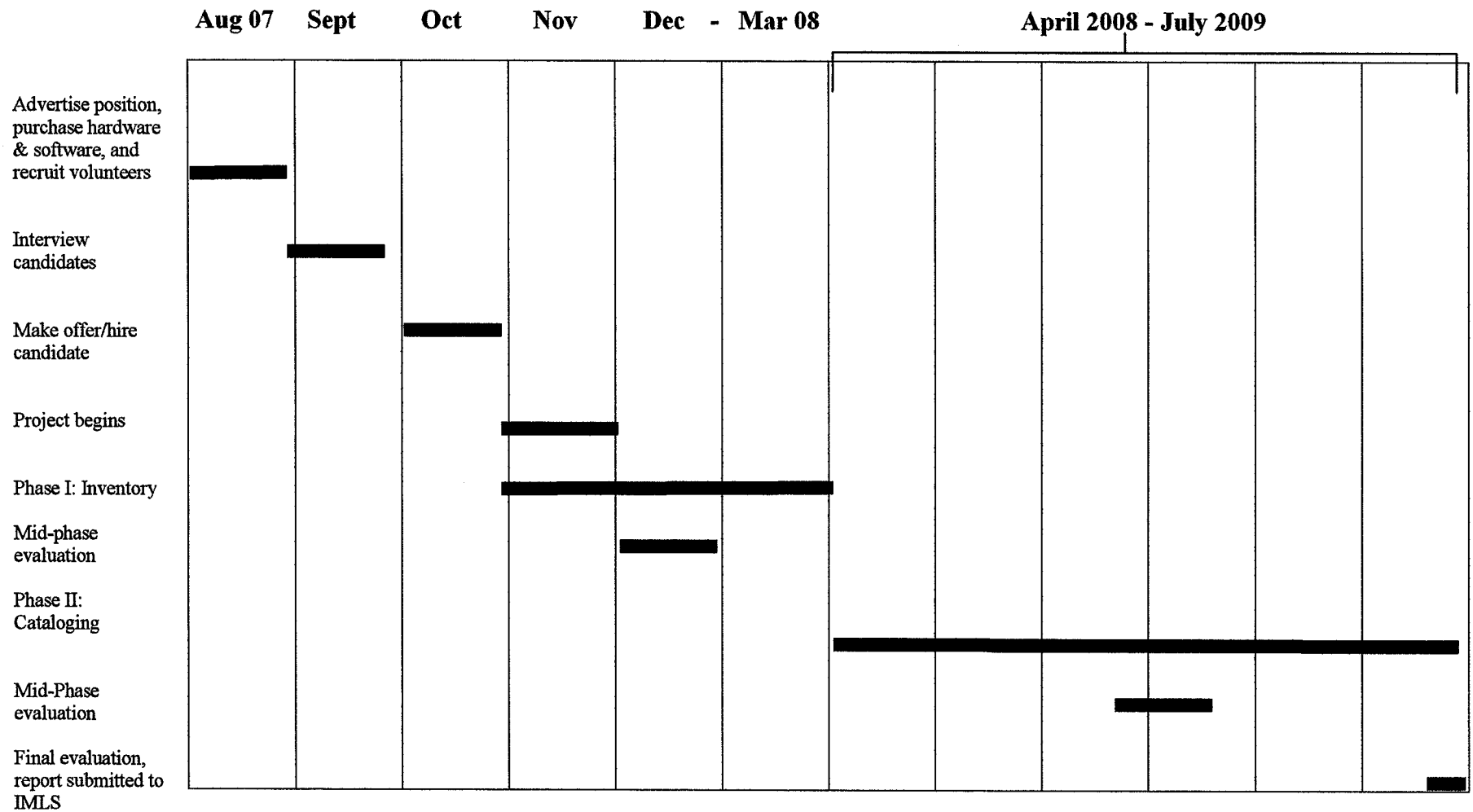
Sarah Capichioni, Administrative Assistant for Stepping Stones, will act as Project Manager. She will help with volunteer recruitment, ordering supplies, and assisting the cataloger when needed.

A part-time Cataloger will be hired for two years, with IMLS funding. Stepping Stones is located one hour from New York City and half an hour from the Connecticut border. Forty percent of the county population holds a Bachelor Degree or higher, with a total county population of over 940,000 people (2000 Census). It is expected that an educated and qualified candidate will be found. As stated in the Position Description, the candidate should possess at least a Bachelor's degree, and have experience managing museum collections. The Lower Hudson Conference of Historical Agencies, Westchester County's regional museum service organization, has provided the names and contact information for four museum consultants who may be interested in a part-time, grant funded cataloging contract, although a regional search will be conducted to identify the most qualified candidate.

**Technology**

While this project is not wholly a "technology" project, its successful implementation depends upon the competent use of technology, a reality of museum cataloging in the 21<sup>st</sup> century.

As part of this project, the cataloger and volunteer assistants will utilize a notebook computer loaded with PastPerfect version 4.0, and a digital camera. Long-term impact will involve the use of these technological components in the use of the images for many purposes including outreach, security, and education.

**Schedule of Completion**



## BUDGET FORM: Section B, Summary Budget

|                                   | \$ IMLS       | \$ Cost Share | \$ TOTAL COSTS |
|-----------------------------------|---------------|---------------|----------------|
| 1. Salaries and Wages             | \$40,000.00 ✓ | \$49,920.00 ✓ | \$89,920.00    |
| 2. Fringe Benefits                |               | \$2,912.00 ✓  | \$2,912.00     |
| 3. Consultant Fees                |               |               |                |
| 4. Travel                         |               |               |                |
| 5. Supplies and Materials         | \$2,645.00 ✓  | \$2,500.00 ✓  | \$5,145.00     |
| 6. Services                       |               |               |                |
| 7. Student Support                |               |               |                |
| 8. Other Costs                    |               | \$500.00 ✓    | \$500.00       |
| TOTAL DIRECT COSTS (1-8)          | \$42,645.00 ✓ | \$55,832.00 ✓ | \$98,477.00    |
| 9. Indirect Costs                 | \$6,397.00 ✓  |               | \$6,397.00     |
| TOTAL COSTS (Direct and Indirect) | \$49,042.00 ✓ | \$55,832.00 ✓ | \$104,874.00   |

### Project Funding for the Entire Grant Period

|   |              |
|---|--------------|
| 1. Grant Funds Requested from IMLS                    | \$49,042.00  |
| 2. Cost Sharing:                                      |              |
| a. Applicant's Contribution                           | \$3,000.00   |
| b. Kind Contribution                                  | \$55,832.00  |
| c. Other Federal Agencies*                            |              |
| d. TOTAL COST SHARING                                 | \$58,832.00  |
| 3. TOTAL PROJECT FUNDING (1+2d)                       | \$104,874.00 |
| Percentage of total project costs requested from IMLS | 46.76 %      |

\*If funding has been requested from another federal agency, indicate the agency's name: